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# 中国成品油价格机制研究

Analysis of Petroleum Pricing Mechanism in China

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## 摘 要

中国成品油价格机制实施已三年之久，在这三年中，国内成品油价格的每次调整都会引起社会大众的普遍关注，而由于机制本身问题导致的油价调整滞后、价格“涨多跌少”、石油公司垄断问题、民营企业生存问题、投机问题等等无不成为学术界、业界以及普通大众热议和讨论话题。面对这些问题，未来中国成品油价格机制该如何改，是当前中国政府急需思考和解决的问题。

本着为现行成品油价格机制寻找出路的目的，本文首先研究了美国、日本和韩国三个国家成品油价格市场化改革的进程和特点，并结合中国现行成品油价格机制存在的问题，提出了从长期来讲，中国要实现成品油价格的市场化，必须培育多元化的市场主体，而政府则必须转变职能，逐渐从价格的制定者转向政策制定者和监督者。紧接着，本文对目前国内外成品油价格构成进行了比较和分析，通过对各个环节价格水平的比较，发现税收的差距是导致各个国家成品油价差的主要原因，而成品油生产、销售各个环节效率水平的差异也是导致成品油价差的原因之一。

延续细分价格构成的思路，本文进一步对各个环节进行了深入研究。通过采用哈伯特石油峰值理论，本文预测出到 2020 年中国的石油对外依存度将进一步增加至 67%。庞大的石油供需缺口，以及由此引致的国际油价对国内经济的影响，决定了中国的油价必须实现与国际接轨。然而与国际接轨并不意味着国内油价水平单纯地由国际油价决定，而是应该同时引入国内供求因素。考虑到短期内中国尚无法培育出多元化的市场主体和发展出具有国际影响力的期货市场，政府需要谨慎选择参考原油基准和调价规则。

然而，对历史政府调价情况和缩短周期、减低幅度的调价方案的模拟结果显示，政府在下调成品油价格时比较及时到位，但由于上调油价时滞后调价，改变了计算的基期，因而导致下调油价的次数减少，上调油价的幅度增大。缩短周期和减低调价幅度可以相应地减低总体的调价幅度，但调整的频率会增加，油价的波动性也比较大。

政府有条件地下放成品油定价权也是当前流传的主要改革方案，但由于目前

中国石油市场垄断性还比较强，无论是在开采、炼制、还是批发零售环节，三大集团都占有绝对垄断优势，民营企业生产的空间有限，因此本文认为现阶段并不适合将定价权下放给三大石油公司，而是应该首要解决民营企业的生存空间问题，政府可以先从放松民营企业原油和成品油进口的限制着手。

本文第八部分采用投入产出模型和 CGE 模型分析了采用减税的方式调整油价对物价水平和经济增长的影响。研究表明，在国际油价上涨过快时，采用税收调节的方式可以极大地缓解高油价对整个宏观经济的影响。

基于所有的研究，本文最后提出，短期内中国成品油价格改革的出路是完善定价规则，建立税收调节和补贴的机制，解决民营企业生产空间问题；长期的出路是，引入竞争，培育多元化的市场主体，建立石油期货市场。

**关键字：**成品油价格机制 市场主体 税收

## **Abstract**

China's petroleum pricing mechanism has been implemented for three years, during which the domestic petroleum price adjustment did attract the public's attention. Due to the defects, the current pricing mechanism has been fiercely criticized for lagging behind international price changes, the monopoly of oil companies, the problem of private oil company, speculative issues, etc.. To solve these problems, China's government needs urgently to propose a new pricing mechanism.

In order to create a market-oriented petroleum pricing mechanism, this paper firstly studies the marketization process and characteristics of market-oriented petroleum pricing mechanism in the United States, Japan and South Korea. And combining with problems in current petroleum pricing mechanism of China, this paper puts forward that in the long term, in order to push petroleum pricing marketization forward, China should focus on reforms for fostering diversified market participants and transforming government function from price makers to policymakers and regulators. And then, this paper analyzes components of petroleum Price. By making a comparison of every component in China and other three countries, this paper finds that the differences of oil taxes is the main reason for the refined oil prices gap among different countries, and differences of the efficiency in the production, storage and sale are the second reason.

Applying the Hubbert peak oil theory, this paper estimates the oil demand and production in 2020. Results show that the China's oil dependence will increase up to 67%, which means that a big shortage of oil and a high risk of influence by international oil prices. So, China should make domestic refined oil prices better reflect international prices. However, linked domestic refined oil prices with the international oil price does not mean that domestic refined oil price is determined simply by international oil prices, the domestic supply and demand should be taken into consideration, too. Considering that it is difficult to develop diversified market

participates and the futures markets with wide international influence in China in the short term, the government should choose the reasonable crude oil benchmark to pricing.

However, according to the history of the refined oil prices adjustment, the simulation results indicate that the government adjusted refined oil prices in time when international oil price decreased. On the contrary, the adjustment of refined oil prices tend to lag behind changes in international crude oil price. In order to investigate if the situation will be caused by shortening the cycle of adjustment and changing the conditions, this paper simulates the possible stimulation by using the daily oil price data from 2009 to 2011. Results show that refined oil prices will be lower than the reality, but the times of adjustment and fluctuations of domestic refined oil prices will increase to some extent.

Certain companies may be allowed to adjust gasoline and diesel prices based on a pricing mechanism. But the oil market is monopolized by three major petroleum companies (CNPC, Sinopec CNOOC) in China, no matter in the mining, refining, wholesale or retail section, and the share of private oil company is low. Thus, in my opinion, at present, it is not suitable to let oil companies set fuel prices. The urgent action which needs to be done is to cut down domestic refining losses of private oil company.

In the eighth section of this paper, we use input-output models and CGE model to estimate the effect of cutting oil taxes on inflation and economic growth. Results indicate that as the international oil prices raise sharply, cut oil taxes can greatly ease the impact of high oil prices on the overall macroeconomy.

Based on the above studies, this paper suggests that, to introduce a market-oriented pricing mechanism, the government should establish a tax adjustment and subsidy mechanism, and solve the problem of private oil company in the short term. In the long term, diversified market participants and oil futures market should be developed.

**Key word:** Petroleum Pricing Mechanism; Market Participate; Tax

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